# CONSUMERS WILL NOT SAVE THE WORLD: WHY NOW IS THE TIME FOR A RESET

GlobeScan *Healthy & Sustainable Living Report* 2023

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# INTRODUCTION

Enabling consumers to live more healthy and sustainable lives is not only crucial for our collective future, but is also an enormous opportunity for brands to build more trust, loyalty, and engagement with consumers.

The 5th annual *Healthy & Sustainable Living* study takes stock of the current state of consumer engagement on the healthy and sustainable living agenda and what we can expect going forward.

We launched the *Healthy & Sustainable Living Research Program* in 2019 with the purpose of helping companies better support consumers to change their lifestyles to become healthier and more sustainable. The research program builds on over 20 years of GlobeScan's public opinion research in the areas of sustainability, branding, and reputation, and is designed to help organizations better understand the diverse mindsets of consumers that shape their barriers to, and enablers of, more healthy and sustainable living.

The 2023 study includes almost 30,000 interviews across 31 markets. It tracks a number of findings over time to understand shifting trends and explores new topics to keep up with the evolving agenda. The research was designed with and supported by a set of committed partners including Akatu Institute, Consumer International, IKEA, L'Oréal, M&C Saatchi Group, NYU Stern Center for Sustainable Business, P&G, PepsiCo, Target, Visa, and WWF International.

# 1. AN UNCERTAIN CONTEXT: A CLIMATE CHANGE TIPPING POINT MEETS A CONSUMER AGENCY GAP

## People are increasingly experiencing the impacts of climate change first hand

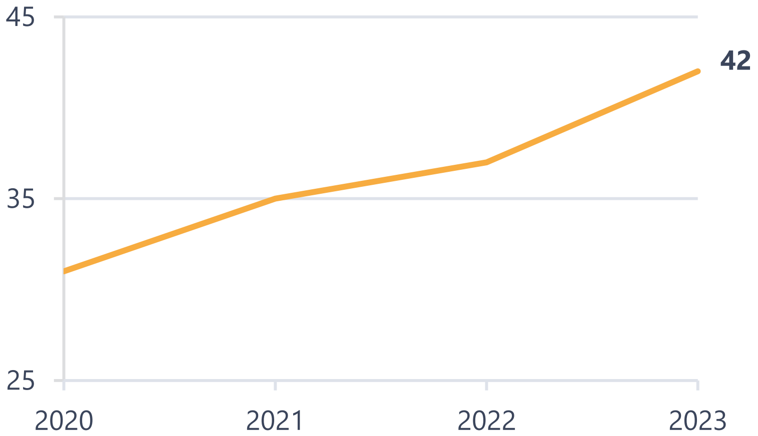
We are rapidly approaching a climate tipping point where soon half of the global population will feel they are greatly personally affected by climate change. The proportion that says they feel greatly personally impacted has increased year on year since the start of tracking this metric in 2020, with over four in ten now saying they are greatly affected. Between 2022 and 2023, the proportion feeling greatly impacted has increased by 5 percentage points, suggesting that next year close to half of people around the world will likely say they feel the direct impact of climate change.

As people start to experience the effects of the climate crisis personally – primarily by increased temperatures, extreme weather events like flooding or drought, or increased food prices as we found in our 2022 research – we will be entering into a new era where most of the global population recognizes that we are in a climate crisis. Public reactions to intensifying climatic conditions are unknown and likely non-linear. Some will respond by supporting stronger climate action, some will resort to a call for more adaptation, and some will look to double down on denial and politicize the agenda. Leaders will need to engage and communicate with the public in different and evolving ways.

## Globally, people increasingly feel personally affected by climate change

### Extent Personally Affected by Climate Change

"Greatly Affected," Average of 26 Markets,* 2020–2023




*For consistent tracking, this chart does not include Colombia, Egypt, Netherlands, Peru, and Portugal, as these markets were not surveyed in 2020.

T2. How much are you personally affected by each of the following? – Climate change or global warming

**63%** now say climate change is a very serious issue compared to 49% in 2003

## Most people feel that there is nothing more they can do

When tracking attitudes around environmental consciousness, there are hints of an increasing sense of disempowerment and a growing reliance on systemic actors like government and industry to take on the burden of addressing climate change and other environmental issues. Over the past five years, we have seen an increase in people saying that individuals cannot do much to save the environment, growing from one-quarter in 2019 to just over one-third in 2023.

At the same time, the large shift in environmental consciousness we detected as the pandemic hit in 2020 appears to be largely locked in, with intentions to reduce one's own negative impact and to consume less to preserve the environment for future generations holding strong while younger people in particular continue to feel a greater sense of guilt.

However, after an initial boost during the pandemic, most people also continue to say they are already doing everything that they can to protect the environment, suggesting many consumers feel they have reached a limit in terms of their perceived ability to help make an impact. In the coming years, business along with government will increasingly have to fill in this agency gap or find ways to mobilize further consumer action around sustainability.

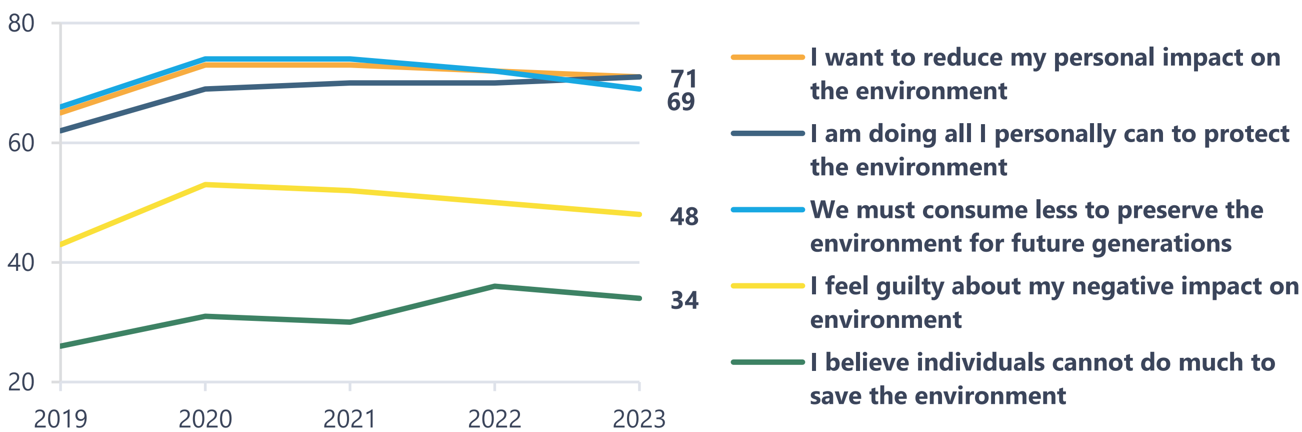
**59%** **of people under 30 agree that they feel guilty about their own negative environmental impact compared to 46% of those over 30**

**The world is rapidly approaching a tipping point where many more people will feel personally impacted by climate change along with other environmental issues. The expectations of business' role in society may drastically change as it did during the pandemic, as consumers are feeling increasingly unable to make an individual difference in the face of such large-scale challenges.**

## After increasing during the pandemic, environmental attitudes remain largely unchanged, signaling a locking-in of stronger environmental consciousness

### Environmental Attitudes

"Strongly" and "Somewhat Agree," Average of 23 Markets,* 2019–2023




*For consistent tracking, this chart only includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, UK, and USA.

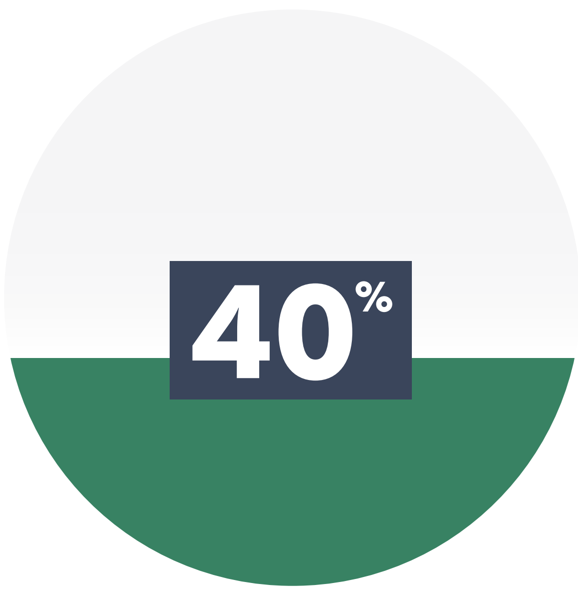
Q6. Please indicate whether you strongly agree, somewhat agree, neither agree nor disagree, somewhat disagree, or strongly disagree with each of the following statements.

# 2. THE CHALLENGE: A NEED TO REWIRE CONSUMER ENGAGEMENT FOR IMPACT

## Most people do not understand what actions have the most impact

When we assess the current state of healthy and sustainable living, it becomes clear that the way we engage with consumers on this topic needs to be reassessed. At this time, people's understanding of sustainability and the impact of their own behaviors remain quite limited compared to what is needed to address social and environmental challenges. It may be the case that many companies, NGOs, and governments are overestimating the level of knowledge that people have about sustainability and their role in a transition to a more sustainable future.

Although most people claim they are doing everything that they can to be sustainable, at the simplest level, most do not fully understand their impacts. Consumers show a fundamental misunderstanding of what actions have the most positive impact on the natural environment, prioritizing tangible actions around waste – particularly recycling. Actions that may be perceived as more difficult to perform tend to be seen as less impactful, such as eating less meat, buying used items, or avoiding air travel, indicating a knowledge gap and an educational opportunity on a global scale.




**of people under 30 say making sure investments are environmentally responsible has a large impact on sustainability compared to 35% of those over 30**

## Tangible, waste-related actions are thought to be most impactful while more "difficult" actions are seen as less impactful

### Perceived Impact of Activities on Protecting the Natural Environment

"Large Impact," Average of 31 Markets, 2023


Q50. Please rate how much of an impact you think each of the following activities have in protecting the natural environment (air, climate, nature, water, wildlife).

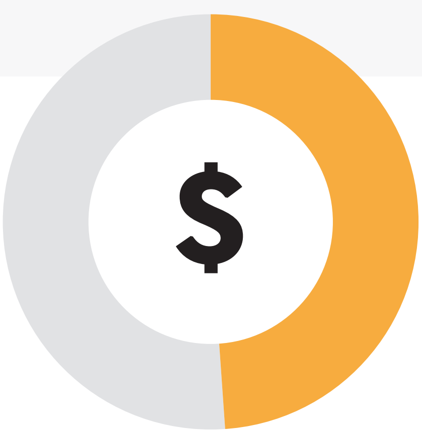
## People are not changing their behavior at the scale we need

Lacking an understanding of what actions are most impactful, people are not changing their behaviors at the scale that science says is required. A range of sustainable actions tracked over the past five years show little meaningful change over time, and slow improvements have mostly stalled entirely in the past year. Although majorities of consumers claim they frequently save energy in their household, recycle, and bring their own shopping bag to the store, the proportions saying they are doing so have not increased much since tracking started in 2019. Less frequent but more impactful actions like eating plant-based food or buying used items instead of new ones remain marginal. As in previous years, fewer than half of people continue to say they avoid single-use plastic items and excessive packaging.

Many claim that the cost of healthy and sustainable living is what holds them back from making the changes needed. Consumers in a wide range of markets increasingly cite the lack of affordability as the main barrier, highlighting the importance of making sustainable options more accessible and affordable. Consumers across several markets including the USA have become less willing to pay a premium for purposeful products and brands compared to 2022, and several markets see ongoing downward trends for willingness to pay more for sustainable options. As people around the world continue to face financial constraints, it is likely that the lack of affordability will limit the actions that most people can take to be more sustainable.

Insufficient support from governments and companies is also seen by many as an obstacle, although the proportion citing a lack of government support has declined slightly – perhaps suggesting that some governments have taken more action to enable healthy and sustainable living and have enacted sustainability legislation in the past few years.

These results show that it has been unrealistic to expect consumers to make drastic changes to their lifestyles, especially during a cost-of-living crisis for many, as well as insufficient government help in the form of infrastructure and regulations or the availability of adequate and compelling choices from brands. There is a need for a combined social infrastructure that conveys both the irresistibility and the inevitability of sustainable choices and lifestyles to consumers.




**49% of people say a lack of affordability is preventing them from living healthy and sustainable lifestyles**

We need to recognize that consumers cannot be expected to drive behavior change as they remain constrained by factors beyond their control, including financial and infrastructure constraints. It is time for brands to step up and meet consumers where they are and to fill the agency gap. This means that we need to shift the approach from one where the onus is on consumers to make the right choices to brands taking on more of the burden of enabling consumers to live healthier and more sustainably. Consumers should not have to figure it out on their own but should instead be able to count on brands to be sustainable by default and be able to rely on governments to make the systemic changes needed with the support of business.

## The slow increase in frequency of sustainable behaviors tracked over time has mostly stalled at the global level

### Frequency of Sustainable Actions

"Most" and "All of the Time," Average of 23 Markets,* 2019–2023


*For consistent tracking, this chart only includes Argentina, Australia, Brazil, Canada, China, France, Germany, Hong Kong, India, Indonesia, Italy, Japan, Kenya, Mexico, Nigeria, Saudi Arabia, South Africa, South Korea, Spain, Sweden, Turkey, UK, and USA.

Q4. Now we would like you to answer a few questions about what you do in your everyday life. Please indicate how often you do each of the following.

# 3. LEADING THE MARKET: THE OPPORTUNITY FOR BRANDS TO FULLY STEP UP

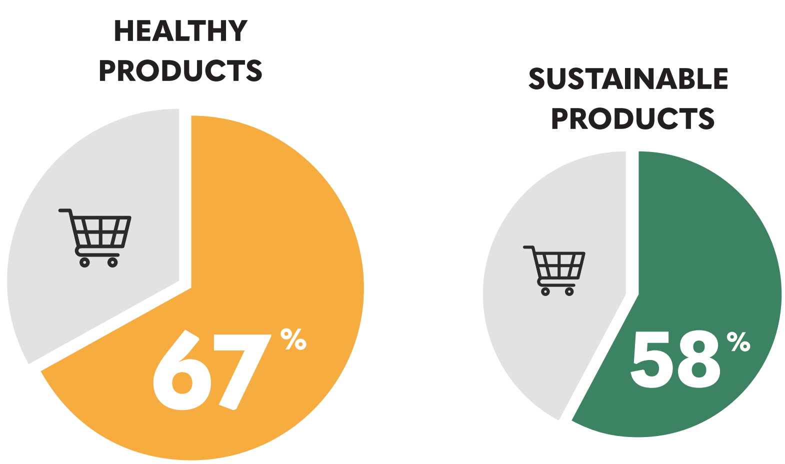
## Consumers express a strong interest in healthy and sustainable products

The marketplace is one important way that consumers can be engaged on healthy and sustainable living. Consumers globally express overwhelming interest in buying both healthy and sustainable products.

Over nine in ten people say they are interested in choosing healthy and sustainable offerings; Japan is the only market where fewer than 80 percent of people say they are interested. Those with stronger self-reported purchasing power also report stronger interest, but those who say they cannot even afford the essentials still overwhelmingly tend to say they are interested – again emphasizing the need to make healthy and sustainable offerings more affordable to all.

However, interested consumers are more likely to say they can find healthy products than sustainable products, and they also have an easier time understanding information on healthy products than on sustainable products. Millennials who are interested tend to be more able than others to buy both healthy and sustainable products in terms of having information, finding the products, being able to afford them, and finding value for money.

The potential of the marketplace to drive healthy and sustainable lifestyles will likely grow over time as these trends spread more widely. There is an opportunity for brands to make healthy and sustainable offerings affordable so that all consumers can have access.




**67% say they can easily find healthy products compared to 58% who say they can easily find environmentally friendly products**

## Sustainable purchasing trends are driven by young people and those with families

More than half of consumers say they have seen more sustainable products in the past year, suggesting that the availability of healthy and sustainable options is improving. Although we are not seeing much change in sustainable behaviors tracked over time, there are some positive trends in the areas of buying more used, vegan, and natural and organic products. Younger people under 30 are more likely than those who are older to buy these types of items, suggesting this is a trend that will grow over time.

Consumers across a wide range of markets on all continents say they have become more likely to buy vegan fashion and furniture items compared to 2021, suggesting people all over the world now increasingly value making more ethical choices. The data also show a significant increase in the frequency of buying second-hand items pre-pandemic compared to post-pandemic, with the most significant increases seen in the European markets surveyed. The increasing cost of living may be linked to more frequent purchasing of used items among Europeans and others, but the strong tendency of young consumers to drive this trend suggests that buying second-hand is not just about saving money; GlobeScan research from 2021 shows that those who buy used items tend to be significantly more likely to claim that they like to stand out because of their style than those who do not buy used items.

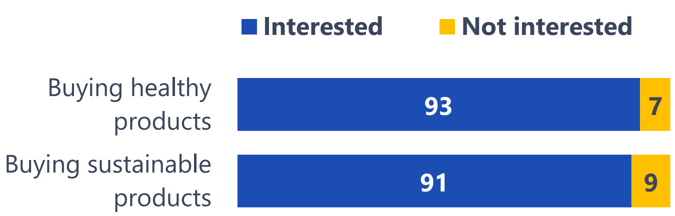
In addition to young consumers, women also tend to drive sustainable purchasing trends. Women are significantly more likely than men to frequently buy cruelty-free, used, vegan, and natural and organic products. Those living with children in their households are also more likely than others to engage in sustainable purchasing habits, including buying cruelty-free, used, vegan, and natural and organic products as well as buying from responsible brands more often and being more likely to rent items instead of buying them.

However, it is essential to make sustainable products that consumers can afford. As many consumers find their purchasing power eroding under the pressures of financial hardship, it is extremely important for brands to continue to focus on affordability, especially as those with the least financial resources also express an interest in making sustainable choices – they are just less able to do so.

### Almost all consumers claim they are interested in buying healthy and sustainable products

**Interest in Buying Healthy and Sustainable Products**

Average of 31 Markets, 2023

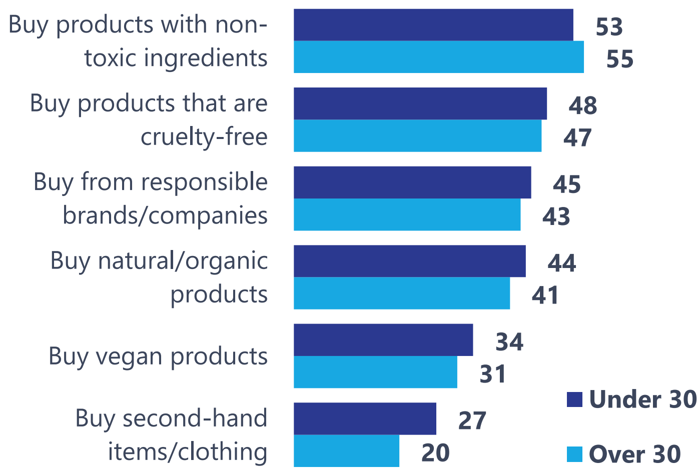



Q54a. Are you interested in buying products that are better for your health?
Q53a. Are you interested in buying products that are better for the environment and nature?

## People under 30 are more likely to engage in sustainable purchasing behaviors

### Frequency of Sustainable Purchasing Behaviors

"Most" and "All of the Time," Differences, Under 30 vs Over 30, Average of 31 Markets, 2023




Q4. Now we would like you to answer a few questions about what you do in your everyday life. Please indicate how often you do each of the following.

**27%** of people under the age of 30 say they frequently buy second-hand items compared to 20% of those who are older

**Brands need to continue to develop sustainable product offerings to serve the young consumers driving this trend – with young people and those with families spearheading demand for products such as vegan, organic, or second-hand, we can expect demand to continue to increase across all demographics and potentially influence healthier and more sustainable lifestyles beyond purchasing choices.**

# 4. THE WINNING CONNECTION: THE HEALTH AND SUSTAINABILITY NEXUS

## An opportunity to connect health and sustainability

The 2023 survey results suggest that consumers see the health/wellness and sustainability agendas as more interconnected compared to many other stakeholders.

The research shows that people clearly recognize that health and sustainability are intertwined. Most say they feel healthier when they spend time in nature and gain physical, mental, and emotional benefits from living a sustainable lifestyle.

Although people are mostly stuck in terms of changing their everyday behavior to become more sustainable, there is some movement toward healthy lifestyles. Over the past two years, people have become slightly more likely to eat healthy food, exercise, and walk or use a bicycle to get around. They have also become more prone to spending time in nature, perhaps as a result of the pandemic.

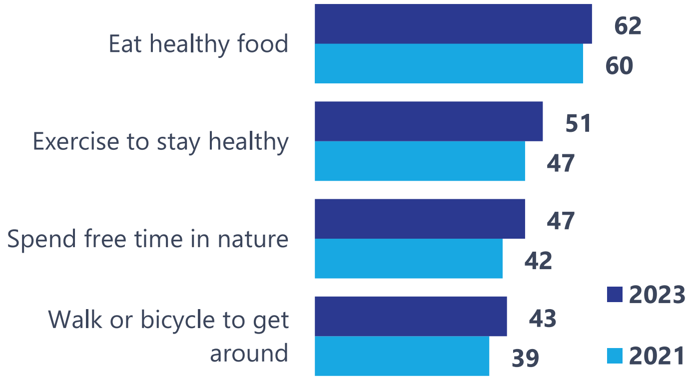
There is also widespread recognition of the negative health impacts of environmental degradation, further driving the perception of co-benefits of healthy and sustainable living. Results show that a global majority claim that plastic waste in nature and in the oceans is negatively affecting their health, although the perceived impact varies among markets. In 2022, results showed that people in the Global South were strongly convinced that environmental issues had a negative impact on their own health.

Healthy living can be a strong driver of sustainable living. There is a need to further harness the strong interest in healthy living and to talk more about the health benefits of sustainable living as people around the world are increasingly making this connection.

**Several reported behaviors associated with healthier lifestyles have increased in the past two years**

**Frequency of Healthy Behaviors**

"Most" and "All of the Time," Average of 30 Markets,* 2021–2023




*For consistent tracking, this chart excludes Egypt.

Q4. Now we would like you to answer a few questions about what you do in your everyday life. Please indicate how often you do each of the following.

## A growing segment of consumers wants to be both healthy and sustainable

A segmentation of the data also reveals that a deep interest in health and sustainability is often connected and that this is increasingly the case. At the same time, the segment of the population that is only interested in becoming healthier – not more sustainable – has become smaller. Over four in ten now want to make major changes to how they live from *both* a health and environmental perspective, suggesting a formidable opportunity for brands and organizations to connect and engage by bringing a holistic health and sustainability perspective.

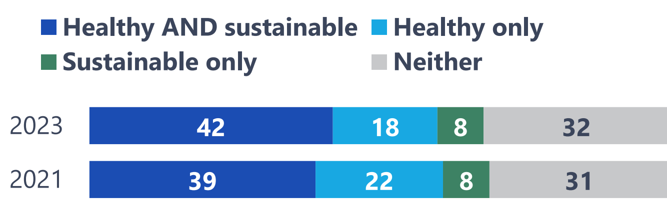
Consumers belonging to the segment that expresses a very strong interest in becoming *both* healthier and more sustainable tend to be slightly more likely than average to be female, younger, with higher incomes, live with children under 18, and urban. These characteristics contrast with the segment that expresses less interest in both healthy and sustainable living, and instead tends to be slightly older, male, less likely to live with minors, and less urban.

**60%** of people globally say they would like to change their lifestyle "a great deal" to become healthier, but only 30% have made "major changes" to do so

### Segmentation reveals that a strong interest in health and sustainability is often interconnected

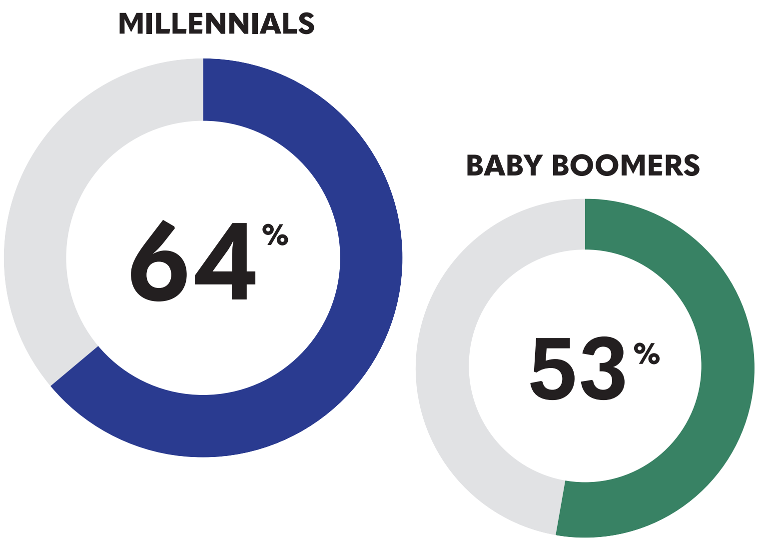
**Health and Sustainability Intersection**

Strong Desire to Change, Segmentation, Average of 31 Markets, 2021–2023




Q2. How much would you like to change your lifestyle to be more...?

Brands need to continuously make the connection between health and sustainability as this resonates strongly with consumers. As people become more impacted by climate change, the negative health impacts will become increasingly critical, further driving the importance of this holistic approach that is needed to drive the sustainability agenda.




64% of Millennials say living a sustainable lifestyle brings their family closer together compared to 53% of Baby Boomers and older

# 5. COMMUNICATE, COMMUNICATE, COMMUNICATE: DO IT AUTHENTICALLY AND DO NOT HUSH

## Brands need to communicate more, not less

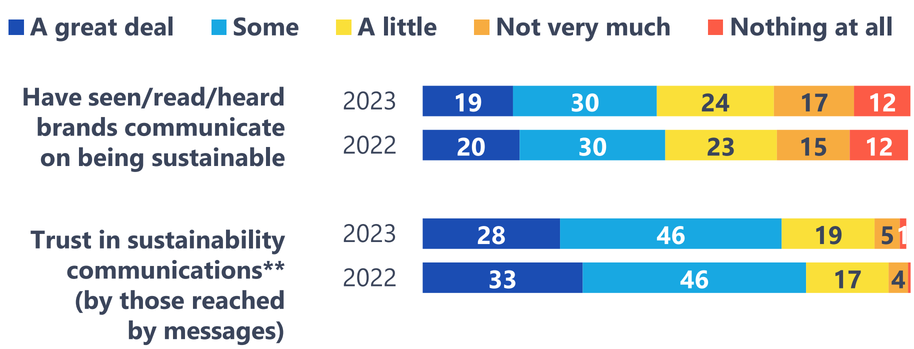
Most consumers also say they would like to learn more about how a brand's products are sustainable. As many as 72 percent of consumers say they would like more information on how companies are making their products better for the environment.

However, when we ask consumers whether they have seen information about product sustainability for specific product types, we find that brands in most product categories are struggling to reach consumers. On average across eight types of products, including cars and automobiles, cleaning products, clothing and apparel, electronics, financial services and banking, home furnishings, packaged food and beverages, and personal care products, only half of consumers say they have seen, read, or heard at least some about how environmentally friendly brands and products are. This proportion has remained largely unchanged compared to one year ago.

**Half of people say they have been reached by brands across an average of eight product categories on sustainability; those who have been engaged tend to trust the messages but there has been a decrease in strong trust**

**Reach and Trust in Sustainability Communications**

Average of Eight Product Categories,*
Average of 31 Markets, 2022–2023




*Includes cars/automobiles, cleaning products, clothing apparel, electronics, financial services / banking, home furnishings, packaged food/beverages, and personal care products
**Subsample: Those who have heard "a great deal" and "some" of sustainability communications for each product category

Q47. For each of the following types of products, please indicate how much you have seen, read, or heard brands communicating information on how environmentally friendly they are. Q48. For each of these types of products, please indicate how much you trust the information about their environmental friendliness. Q49. For each of the following products, please indicate how much environmental friendliness plays a role in your purchase decision.

Consumers who have been engaged by sustainability marketing or communications continue to remain mostly trusting of messages from all categories tested, suggesting brands should confidently continue to communicate sustainability to consumers but do so accurately and authentically. Greenwashing concerns exist but a majority of those who have seen sustainability messages (74%) say that they have at least some trust in them. However, trust in sustainability messaging has declined slightly across a range of markets for most of the product categories compared to 2022. This gradual decline in trust in messaging is more pronounced in some markets such as China, France, Sweden, and the USA, along with some local variation depending on the product type.

## Use the right language to connect with consumers

Trust in product claims may be closely linked to the language used to communicate with consumers, emphasizing the need to carefully target sustainability messaging.

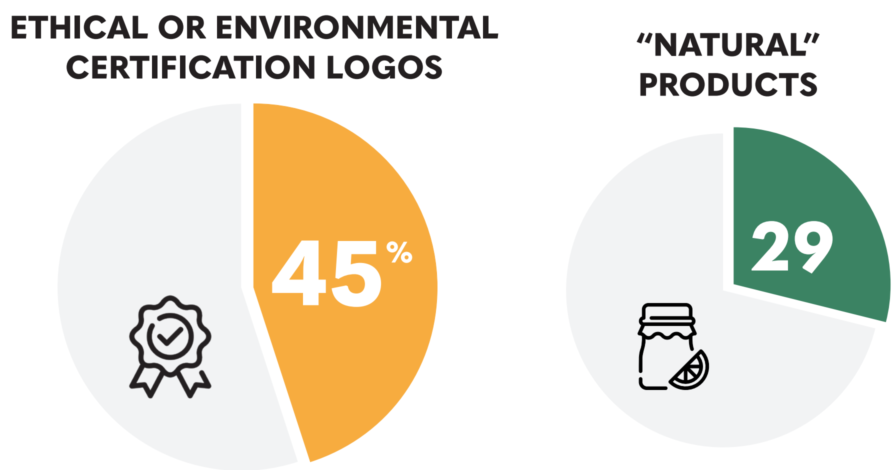
Across a range of specific health and sustainability product claims, consumers are more likely to have seen messages related to nutrition, health, and products being natural; net-zero and carbon-neutral messages are noticed much less frequently by consumers.

**40%** of consumers 30 and older have a large amount of trust in claims of products being "carbon neutral" compared to 35% of those younger than 30

Regardless of the message, consumers under 30 years old are more likely to have been reached by brands making health and sustainability product statements than those over 30.

When asked how much trust consumers have in the product claims that they have seen, trust tends to be highest in claims that relate to plant-based, ethical or environmental certifications, and animal testing. In contrast, consumers tend to be much less trusting of generic claims of products being "natural." Adding to the complexity, there is great variation in how different claims are perceived by different audiences, highlighting the importance of targeting sustainability communications carefully.

However, it is clear that consumers are most receptive to information about brands' sustainability efforts when it is shown directly on the packaging; almost half prefer to see the information this way. Although people of all ages prefer information on packaging, Baby Boomers and older show more preference than others for certifications while Gen Z and Millennials are more likely than older generations to prefer advertisements – again highlighting the importance of carefully targeting sustainability communication strategies.



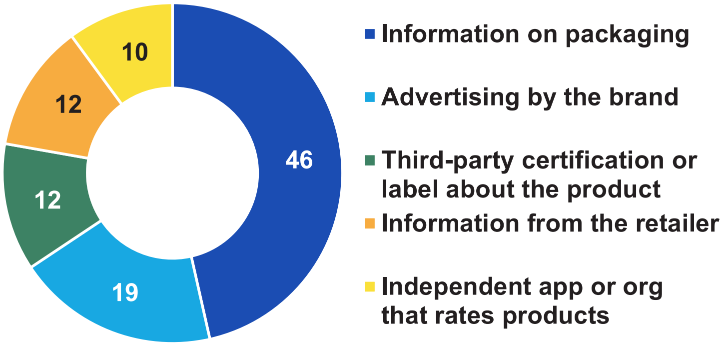

**45% of consumers have "complete" or a "large amount" of trust in ethical or environmental certification logos compared to 29% who have "complete" or a "large amount" of trust in messages of products being "natural."**

Brands need to communicate better about their sustainable product offerings, making it easier for consumers to access information and making sure that trust in such communications does not continue to erode. This includes choosing language that resonates with the consumers that brands want to reach.

**Almost half of consumers want to see information on what companies are doing to make their products sustainable directly on product packaging**

### Best Way to Receive Information about Sustainable Products

Average of 31 Markets, 2023




Q57. What would be the best way to inform you about how environmentally friendly the products are that you buy? Please choose one.

# THE TURNING POINT: BRANDS, AS WELL AS OTHER ACTORS WORKING TO CHANGE CONSUMER BEHAVIOR, ARE PRESENTED WITH THE OPPORTUNITY TO STEP UP

1. **Take stock of where consumers are today** – both in terms of cognitive factors (needs, expectations, knowledge, and receptiveness) and behavioral factors (actions, empowerment, motivators, and barriers)

2. **Rethink the core products and services offered to consumers** – be it in terms of product innovation, delivery, access, etc., to make healthier and more sustainable lifestyle choices a reality

3. **Connect health and sustainability** – harness the health benefits of sustainable living as an onboarding ramp to get consumers engaged

4. **Work to change the wider system** – leverage brand and corporate advocacy efforts to accelerate policy change and infrastructure investments that enable healthy and sustainable lifestyles while creating movements to shift social and cultural norms

5. **Continue to communicate with credibility** – do not hush, but instead share your story with consumers in a compelling way

GlobeScan has decades of experience helping brands engage consumers and drive behavior change toward healthier and more sustainable lifestyles – to know more about our services visit: www.globescan.com/our-services/ or get in touch at: insight@globescan.com

# METHODOLOGY SUMMARY


- Representative online samples of approximately 1,000 adults in each of 31 markets (500 each in Hong Kong, Kenya, Nigeria, and Singapore, and 1,500 in USA) (*n*=29,565).
- Samples are representative of online population, weighted to reflect general population census data.
- Online surveying in July and August 2023.
- Where historical data are shown, questions were asked using an in-person and telephone methodology before 2019.

# CONTACT US

**GlobeScan is a global insights and advisory consultancy working at the intersection of sustainability, behavior change, and trust.**

We partner with leading companies, NGOs, and governmental organizations to deliver insights that guide decision-making and build strategies that contribute to a sustainable and equitable future.

Established in 1987, we have offices in Cape Town, Hong Kong, Hyderabad, London, Paris, San Francisco, São Paulo, Singapore, and Toronto. As a proudly independent, employee-owned company, we're invested in the long-term success of our clients and society. GlobeScan is a Certified B Corp and a participant of the United Nations Global Compact.

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